

Charter School Opening Checklist

This list assumes that you have an approved charter petition, a board with bylaws, and that you are just getting ready to open your school. Tasks on this list may be applicable only to year one of operation or may be required annually.

Facilities

- ☐ Secure a site in proposed attendance area
- ☐ Contact city/county commissioner, and highway district for any building permits that may be needed
- ☐ Schedule facilities inspections (building, fire, and health) with city to obtain certificate of occupancy
- ☐ Ensure proper notice to all utility companies including phone, gas, electricity, water, sewer and cable (2 months is optimum for notice).
- ☐ Ensure that building temperatures, lighting, ventilation and space are adequate
- ☐ Ensure grounds are well maintained and safe (snow removal, lawn care)
- ☐ Design a learning environment that reflects, supports educational mission and vision

Health and Safety

- ☐ Develop a comprehensive emergency response plan
- ☐ Establish fire drill procedures and schedule fire drills
- ☐ Post fire exit maps in all occupied spaces
- ☐ Provide emergency preparedness training to all personnel
- ☐ Provisions for emergency closure before, after, during school

Contracted Services

- ☐ Complete transportation bids
- ☐ Secure fiscal support (accounting, budget, payroll, banking, auditing, purchasing) and outline fiscal policies regarding checks, PO's
- ☐ Secure telecommunications structure
- ☐ Secure IT support
- ☐ Retain legal advice
- ☐ Secure custodial service
- ☐ Secure food service agreements
- ☐ Secure insurance policies: liability, property, worker's comp
- ☐ Lease or purchase office equipment, computers, software, networking, servers

Policies and Procedures

- ☐ Finalize comprehensive set of policies and procedures
- ☐ Complete comprehensive parent/student handbook and orientation procedures: attendance, homework, discipline, school hours, pickup and drop-off procedures, teacher contact, communication pathway, dress code, toys, electronic devices
- ☐ Complete comprehensive personnel handbook
- ☐ Establish a school calendar

Documentation (onsite and accessible to appropriate personnel)

- ☐ Authorized charter document with all amendments 33-5210(3)(b)
- ☐ Incorporation papers with bylaws (including renewals) 33-5204(1)
- ☐ Certificate of occupancy
- ☐ Transportation agreement, if applicable

- ☐ Food service agreement
- ☐ Adopted policies and procedures
- ☐ Facilities inspection, including fire and health
- ☐ Immunization records for all students 33-4801
- ☐ Internet use policy, signed by all students and parents
- ☐ Documentation of all state and federal programs run by the school
- ☐ Documentation of all private, public and other grants
- ☐ Annual reports to authorizers including programmatic and fiscal audits 33-5206(7)
- ☐ Governing board: minutes, schedule of meetings, agendas
- ☐ Schedule of board meetings
- ☐ IBEDS reports
- ☐ Accreditation reports 33-5206(7)
- ☐ Insurance policies:
 - General liability 33-5205(4)
 - Property 33-5205(4)
 - Worker's compensation 33-5205(3)
- ☐ Personnel files
- ☐ Student files, including current IEP
- ☐ Documentation of effort to inform public of enrollment opportunities on file 33-5205(3)(s)
- ☐ Documentation of lottery method and results 33-5205(4)(j)
 - List of enrolled students, coded to show primary attendance area children, siblings, and founder's children
 - List of students who applied for the lottery or application forms
 - Waiting list
- ☐ Continuous school improvement plan (CSIP)

Finance

- ☐ Create a budget; include assumptions, adjust to reflect new developments
- ☐ Revisit assumptions to ensure they are still valid and update accordingly
- ☐ Hold annual public budget hearing
- ☐ Present monthly financial reports to the board in a public meeting
- ☐ Schedule annual fiscal audit and report the results
- ☐ Meet acceptable accounting standards of fiscal management 33-5209(2)(c)
- ☐ File tax exemption paperwork (ST-101) with vendors
- ☐ File non-profit forms with state each year Form 990EZ, 990 PF
- ☐ Develop a fund development strategy

Personnel

- ☐ Negotiate contract with educational director/principal—retain legal counsel to review all contracts
- ☐ Establish and publicly approve a salary schedule
- ☐ Negotiate contracts with teaching staff—retain legal counsel to review all contracts
- ☐ Ensure all teachers hold valid Idaho teaching certificates for the grades they teach and that these are on file in their personnel files 33-5205(4)(g) and 33-5206(4)
- ☐ Ensure that all teachers are highly qualified according to NCLB

- ☐ Ensure staff contracts are written in form approved by the State Superintendent of Public instruction 33-5206(4)
- ☐ Ensure criminal background checks have been completed for all employees 33-5210(44)(d) (consider background checks for volunteers)
- ☐ Document teacher training opportunities through professional development plan or other
- ☐ Enroll all staff in PERSI
- ☐ Ensure that all paraprofessionals working in an instructional capacity meet requirements of State paraprofessional Standards and federal NCLB requirements
- ☐ Provide social security, unemployment insurance, worker's compensation insurance and health insurance for all staff 33-5205(3)(m)
- ☐ Ensure up-to-date and accurate personnel files for all employees that contain only appropriate information
- ☐ Ensure annual review of every teacher

Governance

- ☐ Ensure that board has a set of bylaws that address key issues including how the board will be formed, role of board members, terms of board members, how board members can be removed, time of annual meeting—how meetings conducted/process for order, in accordance with IOML
- ☐ Post all meeting schedules for public
- ☐ Provide attendance logs and minutes for all public meetings, including special meetings, per Idaho Open Meeting Laws
- ☐ Provide parents with contact info for the board
- ☐ Adopt policies and procedures for the school-- establish policies in key areas, including: attendance, check signing, credit card, enrollment, family medical leave, job sharing, use of facility by outside groups, communication, homework, dress code, student discipline, internet use, overnight excursion, background checks on volunteers, founders—adopt policies of authorizer with waivers in other areas
- ☐ Establish committees to assist in work of board—some will be standing others temporary
- ☐ Obtain training for the board in key areas including: open meetings law, parliamentary procedure, effective meetings strategies, role of a board member, governing v managing, policy development, fiscal controls, etc.
- ☐ Conduct an annual review of your board—self evaluation focusing on effectiveness of the board to meet its obligations to the school
- ☐ Establish a mechanism for the board to obtain updates about legislation and state rules that will affect charter schools
- ☐ Clarify roles and responsibilities of administration and of governing body

Educational Program

- ☐ Adopt curriculum consistent with charter vision and mission
- ☐ Purchase furniture and learning supplies including computers, software, curriculum, etc.
- ☐ If curriculum or education program change, contact authorizer—a charter amendment may be in order
- ☐ Ensure that students are meeting measurable Student Educational Standards as described in the charter 33-5205(4)(b-c)
- ☐ Identify a testing coordinator

- ☐ Install a student information system (SIS)
- ☐ Collect and analyze student baseline data: educational, demographic
- ☐ Demonstrate growth for students consistently enrolled in your program
 - Compare results to district, states, other charter schools using the same educational program
 - Ensure students are demonstrating adequate yearly progress. If not, what measures are being implemented to ensure this happens? How have these been communicated to the authorizer?
 - Submit ISAT, IRI, DWA, DMA scores to authorizer in programmatic audit
- ☐ Track student demographics: compare to state, district, explore discrepancies
 - # of students in special education
 - # of minority students
 - # of LEP students
 - # of GT students
 - # of low income students
- ☐ Ensure teachers teach to state curriculum standards
- ☐ Ensure that adequate classroom materials, technology and books are available to all students
- ☐ Ensure that student performing below grade level are identified and provided with remedial instruction, especially in early literacy
- ☐ Ensure basic values of honesty, self-discipline, unselfishness, respect for authority and central importance of work are emphasized 33-1612
- ☐ Ensure high school students will earn a minimum of 42 credits prior to graduation
- ☐ Ensure all special education students' IEP's are current and that specified services in each are being met
- ☐ Ensure board and staff have mechanisms in place to stay updated about school reform measures that will affect educational progress

Community & Parent Involvement

- ☐ Keep parents and stakeholders involved
- ☐ Develop a procedure to report student progress to parents
- ☐ Schedule regular parent, teacher, and student conferences
- ☐ Publish a student handbook and ensure its annual review by students and parents
- ☐ Develop a plan to involve parents and community in key aspects of the school
- ☐ Locate community partners
- ☐ Develop a community relations plan to build public awareness and support for school, include a press strategy

General

- ☐ Submit a copy of the approved and any updated copies of the petition and notification of approval from the Trustees to the State Board of Education and the State Department of Education.
- ☐ Secure SDE passwords and ensure SDE communication
- ☐ Create a calendar of all state and authorizer deadlines
- ☐ Attend state meetings: superintendent meetings, accreditation briefings, legislative briefings, etc.
- ☐ Conduct an annual review of the charter document
- ☐ Consult your attorney before making major decisions
- ☐ Maintain regular contact with authorizer